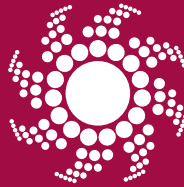




**ELECTORAL
REFORM
SERVICES**



**Membership
Engagement
Services**

Motivating your membership:
shared experiences of the
FT sector 2004-2008

Summary of Findings

The journey to Foundation Trust status is complicated. Membership managers are tasked with helping their Trusts evolve from purely patient focused services to fully functioning membership bodies, and this requires a lot of hard work.

Membership Engagement Services and Electoral Reform Services were pleased to sponsor the 2008 FT Network conference in Leeds. We organised and ran two workshops looking at three key areas for both aspirant and existing FTs: 'Membership Management', 'Getting Members' and 'Election Time'. Our aim was to share experiences with Trusts, learn from each other and publish a summary of this. We are pleased to present our findings and would like to thank everyone for their valuable contributions.

1. Membership Management

How do Trusts talk to and work with their members?

Communication:

- Most Trusts send out quarterly newsletters. An increasing number of these are being sent electronically to keep costs down, but this requires careful management. Some Trusts communicate with up to 40% of their membership through email.
- Membership mailings can be linked to specific events. Trusts expressed interest in targeted mailings for different ethnic groups or geographical areas. One Trust prepared ghost editorials which could be published in local newspapers at no cost when there was free space. They were successfully published.

Retention:

- This is a big issue. Awareness of 'churn' linked to people moving away or dying. Regular data cleansing is needed.

Growth of membership:

- The focus is now on quality as opposed to quantity and there is more interest in increasing numbers of under-represented groups.
- 'Members get members' initiatives, where existing members are encouraged to sign up, e.g. 10 members each.
- Incentives for membership, e.g. discounts at hospital restaurants, are proving very successful.

Successful member engagement approaches:

- Combining AGMs with clinical presentations/ 'live' operations/theatre spaces as forums for discussing latest developments.
- Open days with different themes, e.g. 'healthy hearts' linked to World Heart Day.

- One Trust had film clubs that screened films with mental health themes at local cinemas followed by discussion groups – mainly for young people. This was low cost and relatively successful (membership of young people went from 3% to 20% in less than a year).
- Themed consultation events such as infection control briefings are having some success. Some Trusts are also involving local organisations such as rotary clubs to assist with sponsorship and refreshments. Member office 'drop-in' sessions are sometimes operated but with limited success.

Engaging with governors

- There is debate about whether it is a governor's responsibility or the board's to increase membership. Many feel that governors should be used as an engagement tool.
- 'Surgeries' have been of limited success though, particularly for larger geographical areas.
- The creation of 'portfolio' style responsibilities for governors, e.g. board member appraisals/member outreach. Many Trusts set up sub-committees to focus on different issues.
- Different Trusts have very different relationships with and expectations of their governors. The sort of welcome governors receive seems to make a big difference in later involvement/participation – is it an open or closed door?
- Some Trusts link governors to voluntary organisations.

Staffing and resources for Trust membership teams

Most Trusts have only one or two dedicated staff members. Additional mailings or membership

communications, particularly around the election period, can put a real strain on time and resources. Trusts are starting to become more interested in outsourcing membership engagement work, without facing further costs or losing control and knowledge of how its members are being managed.

What targets are Trusts given?

- Monitor does not provide concrete targets; however, in the past 4 years figures around 10,000 or 2% have been mooted.
- Many aspiring ambulance Trusts are concerned about the 2% figure given the overall size of their catchment areas.
- More recently, the focus has shifted to the membership's makeup, not size. Some Trusts have advanced knowledge of their demographics, but some have little or none and are keen to learn more.

2. Getting Members

Three different approaches Trusts take:

1. Going for numbers...

This approach is used by most Trusts, particularly aspiring Trusts. Trusts build a solid base first and then identify membership gaps to target. Engagement activities are then aimed at the existing members.

2. Ensuring good engagement first ...

Recruitment follows successful community engagement. This begins with effective marketing, education and involvement initiatives. Members can participate and help educate, involve and recruit others. Engagement activities are therefore marketed to everyone, not just existing members. Word of mouth from existing members is an excellent recruiter.

3. Ensuring the membership is representative...

The Trust focuses on ensuring their members are representative as opposed to sizeable. The existing members are then used to recruit family

and friends. If the Trust succeeds in involving all groups, the membership grows proportionately.

What engagement tools work?

Face-to-face:

- ✓ Particularly good for targeted recruitment;
- ✓ Good for a 'last minute' push;
- ✓ Can be combined with qualitative research;
- ✗ Not cost-effective;
- ✗ Does not always guarantee a well informed or engaged membership;
- ✗ Not all settings are suitable.

Mailings:

- ✓ Delivers numbers and is very cost effective;
- ✓ Informative and provides a complete picture of the Trust;
- ✓ Requires pro-active joining, therefore members are likely to be more engaged;
- ✗ Though targeting is possible, it is more time consuming.

Telephone recruitment:

- ✓ Can be effective and raise numbers;
- ✗ Can be seen as intrusive and may harm public perception of the Trust;
- ✗ Does not tend to yield engaged and informed membership. Drop out rate can be higher.

Advertising:

- ✓ Supports other recruitment methods;
- ✓ Educative;
- ✗ Difficult to measure impact.

Events:

- ✓ A good way to meet with, inform and involve the public;
- ✓ If done well, it will yield engaged and informed members who will spread the word;
- ✗ Expensive and not cost effective (if purely measured by numbers recruited);
- ✗ Requires a lot of resources and planning.

Road shows:

- ✓ With good facilitators and messaging, can be very effective;
- ✗ High Costs.

Some thoughts on recruitment to take away ...

- Regardless of the recruitment methodology used, the following principles are vital:
 - true partnership;
 - community ownership;
 - clear messaging;
 - tailored to suit target audiences.
- Many of the benefits of membership are intangible. It is a good idea to include visible and more obvious benefits, such as discounts, free parking and so on.
- Joint marketing and recruitment with neighbouring Trusts may be a good way forward. At the moment, and as more FTs are formed, Trusts are increasingly in competition with one another.
- Younger members are a particularly tricky target audience. Considerations include:
 - Use more appropriate communication channels, e.g. email/text;
 - Target appropriate venues;
 - Invest time in learning and focusing on young people's interests. Adapt your marketing strategy appropriately and *innovate*.
- One size does not fit all. Different Trusts, and different types of Trusts, have different needs and considerations, particularly specialist Trusts such as Mental Health Trusts.
- It is all about building relationships and thinking longer term.

3. Election Time

Turnout matters

- Various reasons why turnout could be falling were cited:
 - There are more Trusts so there is more competition for members. Keen and interested members are spread out.
 - Numerous Trusts in a local area may mean individuals receive numerous ballot papers if they are multi-Trust members – this can lead to apathy.

- General apathy – is this just an example of general political apathy? Turnouts in local and national elections have been in steady decline for some years; FTs may simply be part of this trend.
- There is a lot of interest surrounding early elections for a Trust – but does this interest evaporate over time? Media coverage has also dwindled and the FT model is less of a thorny subject.
- Are Trusts more focused on turnout levels at the inaugural stage? Currently this is the only time Monitor looks closely at turnout figures; however, there is a general feeling among Trusts that Monitor are going to ask them to report annually on election turnout and participation – is there a chance that this trend will change?

Getting candidates interested

The primary trend we are seeing is an increase in candidate interest within inaugural elections, with the average number of candidates standing per Trust almost double since Wave 1 in 2004. Authorised Trusts however, do seem to be facing an increasingly difficult challenge when trying to recruit prospective candidates.

Why?

- Trusts are increasingly using various membership levels to qualify members. For example, gold membership indicates they are interested in greater involvement with the Trust and are keen to stand as a governor; bronze members are those who want to hear about developments within the Trust. It seems that Trusts are focusing on gold members, immediately having a direct effect on the number of candidates; however, as a long term strategy Trusts must also remember to direct their time and effort at other groups. Could some of the bronze members be upgraded to silver and silver to gold?

- Inaugural elections often see a long run up with regards to the amount of time and focus the Trust put in – Trusts must not forget to maintain this with future elections. In order to generate interest and in turn get candidates the, membership must be aware of what is going on. Look at different ideas:
 - Local newspapers – adverts/press releases
 - Open days/candidate sessions
 - Pre-nomination communication – start this as early as possible to get the message out there
 - Local membership events
 - Utilising existing governors to spread the word

that members do not feel qualified to vote as they feel they do not know enough about the candidates.

- Internet voting options – we are awaiting formal approval in order to proceed down this path but it can help overall turnouts and can certainly help in specific areas, e.g. rural areas and young people.
- Voter profiling – this can help identify areas of membership that are not participating. Longer term strategies and methods can then be developed.

Don't Forget Your Staff!

Trusts spend much time and effort focusing on public members, sometimes forgetting and neglecting their staff. The result is that Trusts can often struggle to fill vacancies and average turnout in staff constituencies is often 15-20% lower than in public areas.

Staff form a vital part of a Trust's membership and, as with public members, work needs to be done over the long term to encourage participation.

What can be done?

- There is a strong belief that a membership which is engaged and active will provide higher turnouts come election time – so general membership engagement methods should have a knock-on effect.
- Reminder post cards/emails/text. Postcards have worked very successfully on a number of occasions but can be expensive – using membership data you have intelligently is the key.
- Husting events/meet the candidates sessions or Podcasts – these are all good tools for better engagement. A common theme was

“ ”

Some comments from the workshop



A useful exchange of ideas

Very useful as we are only just starting out

Good opportunity for networking

The best I've been to! Thanks

Very professional



MES and ERS can assist your Trust with all these areas.
For more details please contact the Foundation Trust
team at either Electoral Reform Services or
Membership Engagement Services



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**For Membership Participation and
Electoral Management**